

# WE Wealth Management Solution



- + **Find qualified wealthy prospects** to engage in sales and marketing campaigns
- + **Grow your book** by finding affluent and high-potential individuals
- + **Expand existing clientele** by understanding the full picture of your clients' assets
- + **Customized solutions** built for both large financial institutions and smaller RIAs

## Overview

WealthEngine's Wealth Management Solution that has been designed to fit the needs of a Financial Services organization. It contains product components best suited to your goals, whether you are an independent RIA looking for a starter package or a large financial institution looking to execute complex prospecting campaigns.

## Benefits



### Find and Qualify New Customers

WealthEngine makes finding and qualifying the perfect prospect simple by enabling you to create ultra-segmented audiences using wealth, demographic, lifestyle, and personal attributes across a database of more than 240 million people and 125 million households in the US. Our solutions provide you instant access to the most current business and personal contact information for your new target prospect list so you can be confident you're connecting with the right individuals.



### Expand Existing Clientele

With comprehensive wealth insights, you are better situated to acquire more of your current clients' assets to manage. WealthEngine can provide you a full picture of your clients' net worth that you don't currently manage – the assets, mortgage information, and wealth that you may not know about. With this knowledge you can understand which clients have the ability to expand and increase your share of their wallets.



### Personalize and Strengthen Relationships

Lasting client retention is grounded in knowledge about what is truly important to your clients – which extends far beyond money. WealthEngine can help you gain a better understanding of your clients' and prospects' detailed interests, lifestyle attributes, political affiliation, and charitable giving so you can tailor your engagement in a way that makes sense.

## Solution Options

WE offer packages at several levels – Starter, Core, and Professional. Each are designed to fit the personalized needs of your organization. All packages include training and access to customer care to ensure that you get the most out of our solutions.

Our Wealth Management Solution contains the products and services below – the specific configurations are based on the chosen level.



**WE Search:** Find out more about the wealth, capacity, lifestyle, and demographics of your clients and prospects with in-depth profiles and advanced research capability.



**Care:** Ramp up quickly and smoothly on our platform with WealthEngine's premium support from a dedicated Success Representative.



**WE Prospect:** Create ultra-segmented prospect audiences using 1,500+ custom attributes across a database of more than 240 million individuals in the US.



**Circle of Friends:** Tap into the social connections of your clients and prospects to exponentially broaden your network.



**Consulting:** Assess your business environment, identify challenges and opportunities, design solutions, and deliver concrete strategies and tactics through custom engagements.



**Training:** Get the most out of our solutions by participating in training, offered both virtually and in-person.

Solutions can be customized to include other WealthEngine products and services, including:



Integrations with Salesforce and other CRM Platforms



WE Analyze



Consumer Data Appends



Professional Services



API Integration



And more

## Get Started Today

WE work with you to determine a solution best suited to your organization's needs.

Contact us at 800.933.4446 or visit at [wealthengine.com](http://wealthengine.com) to choose the solution that is best for you.



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